

Statistics Weekly

Thursday, 11 November 1993



statistics

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Retail trade still struggling

Retail turnover for September 1993 has continued the very weak growth in the trend estimates evident in August 1993. The trend estimates which had increased by 0.3 and 0.4 per cent in early 1993, have weakened in recent months with both August and September estimates recording growth of only 0.1 per cent. The annual growth rate (September 1993 over September 1992) was 3.0 per cent.

Of the five major industries covered by the survey, other food stores is the only industry to show strong growth. The grocery industry and hotels, liquor stores and licensed clubs have shown weak to moderate growth over recent months. Clothing and fabric stores have shown no growth over the last three months. Department stores have remained in decline.



RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER

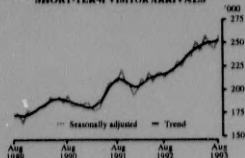
	Original value in September 1993 (\$m)	Average monthly percentage change in trend estimates	
		3 months ended September 1993	12 months ended September 1993
Grocers, confectioners, tobacconists	2 443	0.2	0.4
Butchers	200	-1.1	0.1
Other food stores	530	1.0	-0.2
Total food group	3 173	0.3	0.3
Hotels, liquor stores, licensed clubs	980	0.4	0.6
Department and general stores	836	-0.6	0.0
Clothing and fabrics stores	519	0.0	-0.2
Electrical stores	475	1.4	0.8
Pharmacies	420	0.7	1.4
Newsagents	249	-1.4	-0.8
Other industries	1 445	n.a.	n.a.
All industries	8 099	0.1	0.3

In constant price (i.e. allowing for price changes) seasonally adjusted terms, the total Australian estimate for the September 1993 quarter fell by 0.6 per cent over the June 1993 quarter but rose by 0.4 per cent over the September 1992 quarter.

RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER At average 1989-90 prices, seasonally adjusted

	\$ million	Percentage change	
		From previous quarter	From corresponding quarter of previous year
1992			
September	21 981	-0.6	1.4
December	21 991	0.0	1.4
1993			
March	21 957	-0.2	0.9
June	22 205	1.1	0.4
September	22 078	-0.6	0.4

SHORT-TERM VISITOR ARRIVALS



Visitor numbers rise to hit an all-time August high

The trend estimate for short-term visitor arrivals showed marginal increases in both July and August 1993. A reanalysis of the trend estimate in August contributed to a turnaround in the July figure, which had previously recorded a marginal decrease. In seasonally adjusted terms, there was an increase in short-term visitor arrivals for August 1993, up 5 per cent from the July 1993 figure.

The number of overseas visitors in August 1993 in unadjusted terms was 239 900. This represented a 21 per cent increase over August 1992 and was the highest August figure on record.

The number of overseas travellers attending conventions was the fastest growing category in the eight months to August 1993, up 61 per cent over the same period last year.

Travel for conventions was also a feature of short-term departures of Australian residents. The category recorded the strongest growth in the 1992 calendar year, up 23 per cent over 1991. This represented approximately 144 Australians leaving per day in 1992 to attend conventions overseas.

Japan was the main source country of visitors in the month of August with 26 per cent of the total, followed by New Zealand with 23 per cent and the United States of America with 8 per cent.

In the first eight months of 1993, large increases in visitor arrivals were recorded from South Africa (85%), Taiwan (72%), Korea (69%), Indonesia (50%), Singapore (45%) and Thailand (42%). Based on the figures for the eight months to August 1993, South Africa now ranks ahead of The Netherlands, China and Sweden as a source country for visitors to Australia.

Permanent settlers well down

The number of permanent arrivals in Australia in the first eight months of 1993 was 42 910, a decrease of 34 per cent over the same period last year.

Numbers were down from all major source countries except the Former Yugoslav Republics, for which the figure rose by 82 per cent to 3 270.

For further information, order the publication *Overseas Arrivals and Departures, Australia (3401.0)*, or contact Robert Chibmall on (06) 252 6671.

Marriage rate sliding and civil weddings near half of total

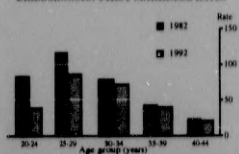
There were 114 752 marriages registered in Australia in 1992. Although the numbers registered over the last twenty years have fluctuated, there has been a marked downward trend in the crude marriage rate or number of marriages per 1 000 population. The crude marriage rate fell from 8.7 per 1 000 in 1972 to 7.7 in 1982 and 6.6 in 1992.

The declining trend in first-time marriage rates was particularly evident in the younger age groups. Between 1982 and 1992, the rate for men and women in the 20 to 24 year age group halved while the rate for the 25 to 29 age group fell by around 25 per cent for men and 14 per cent for women.

In 1992 the percentage of marriages performed by ministers of religion continued the long established downward trend. In 1972, 86 per cent of all marriages were performed by ministers of religion, falling to 58 per cent 20 years later. In 1992, Victoria recorded the highest proportion of marriages performed by ministers of religion (61%) while the Northern Territory recorded the lowest (38%).

Remarriage rates, those men and women remarrying per 1 000 of widowed and divorced in the population, also continued a long-term decline in 1992.

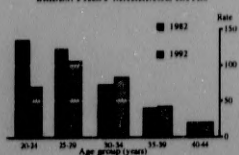
BRIDEGROOMS: FIRST MARRIAGE RATES



The age at marriage for both men and women in Australia increased in 1992 when compared with 1972, although men are still likely to be older at marriage than women.

In 1972, the median age of all bridegrooms was 23.8 years and for those men marrying for the first time it was 23.3 years compared with 28.7 and 26.9 respectively in 1992.

BRIDES: FIRST MARRIAGE RATES



The median age of brides increased from 21.4 years in 1972 to 26.3 years in 1992. For those women marrying for the first time increases were also recorded in the median age, rising from 21.0 years in 1972 to 24.7 years in 1992.

There were 77 092 marriages where neither partner had been previously married, representing 67 per cent of all marriages registered in 1992. This was considerably lower than the percentage recorded in 1972 (85%).

The period of time between the previous and current marriage was generally shorter for men than for women. In 1992 the median interval waited by men was 2.9 years and for women, 3.5 years. Of divorced persons, the median time waited by men was 2.8 years and 3.2 years for women.

The difference in the interval to remarriage between widowed men and women was more marked. In 1992 widowers waited a median of 3.9 years while widows waited a median of 5.8 years.

In 1992, 38 per cent of men and 39 per cent of women who remarried had dependent children under 16 years from previous marriages.

Of the marriages registered in Australia in 1992, 64 per cent were marriages where both partners were born in Australia. Marriages where both partners were born in the same overseas country represented 8 per cent of all marriages.

For further information, order the publication *Marriages, Australia* (3306.0), or contact Michael Nunn on (06) 252 6755.

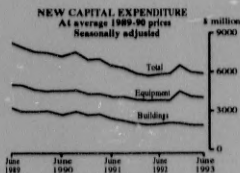
No expected upturn in investment

The latest (third) estimate of expected private new capital expenditure during 1993-94 is \$24 348 million, almost the same as the corresponding estimate for 1992-93 from the June quarter 1992 survey. The June quarter 1993 estimate is 3 per cent higher than the March quarter's second estimate and 10 per cent higher than the low first estimate for 1993-94 reported in the December 1992 survey. However, the latest estimate for 1993-94 is 6 per cent lower than the actual expenditure for 1992-93.

The revised estimate, in original terms, of actual private new capital expenditure for 1992-93 was \$25 801 million, showing a rise of 6 per cent over the (revised) 1991-92 estimate. This increase occurred mainly because of expenditure on large equipment items in the December quarter 1992.

NEW CAPITAL EXPENDITURE, JUNE QUARTER 1993
Seasonally adjusted at current prices

	Percentage change	
	1992-93 over 1991-92	1993-94 expected over 1992-93 actual
Type of asset		
Buildings and structures	-4	-5
Equipment, plant and machinery	12	-6
Total new capital expenditure	6	-6
Industry		
Mining	22	29
Manufacturing	3	6
Finance, property and business services	-6	-28
Other	8	-23



In brief ...

□ Inbound tourism operations

Preliminary results from a survey of inbound tourism operations indicate that during the year 1992-93 over 1.2 million overseas passengers paid almost a billion dollars to inbound tour operators located in Australia, for the ground content (e.g. coach transfers, accommodation, meals, cruises, etc.) of tourism packages in this country. Of these passengers, 47 per cent came from Japan and a further 31 per cent came from other Asian countries.

Significant numbers of passengers were also recorded from North America (7%), New Zealand (6%), Europe (5%) and the United Kingdom and Ireland (4%). Invoices from passengers from Japan accounted for 54 per cent of the total received followed by passengers from other Asian countries (23%), North America (9%), New Zealand (5%), Europe (6%) and the United Kingdom and Ireland (3%).

Inbound tour operators employed more than 2 000 full-time and more than 500 part-time employees in Australia and almost 300 full-time employees overseas.

Results from the Survey of Inbound Tourism Operations, Year ended 30 June 1993 are now available and can be obtained by contacting Andy Harris on (06) 252 5452.

□ Financial estimates

The deficit for all levels of government combined is expected to rise from \$18 374 million in 1992-93 to \$21 884 million in 1993-94. This comprises an expected growth in the current deficit of \$4 735 million, partly offset by a fall in the capital deficit of \$1 226 million.

The dominant contributor to the rise in current deficit expected during 1993-94 will be the Commonwealth Government. Its current deficit is expected to rise from \$7 592 million in 1992-93 to \$11 397 million in 1993-94. This is due mainly to a forecast of continued low revenue growth in 1993-94 whilst outlays on personal benefit payments continue to grow at a higher rate. The Commonwealth capital deficit is expected to fall from \$8 659 million in 1992-93 to \$6 368 million in 1993-94, mainly reflecting offsets to capital outlays expected from major asset sales of \$2 400 million in 1993-94.

The combined State, Territory and local government surplus of \$648 million in 1992-93 is expected to move to a deficit of \$3 007 million in 1993-94. This is due partly to the offsetting effects of major asset sales in New South Wales and Victoria in 1992-93 and expected higher outlays for redundancies and superannuation in Victoria in 1993-94.

Source: Government Financial Estimates, Australia, 1993-94 (5501.0).

□ Foreign trade

Merchandise imports for September 1993 were \$5 364 million, a decrease of \$286 million (5%) on August 1993 and up \$184 million (4%) on September 1992. The largest increases were recorded for telecommunication equipment, up \$49 million (25%) to \$243 million; and organic chemicals, up \$27 million (74%) to \$139 million. For the three months ended September 1993 imports were \$16 393 million, up \$1 353 million (9%) on the same period a year earlier. The largest falls were recorded for non-road transport equipment, down \$500 million (65%) to \$271 million; and petroleum products, down \$81 million (8%) to \$944 million.

Inquiries

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11 November 1993

Order from the following:

Expected releases over the fortnight to 23 November

- 11** The Labour Force, Australia, October 1993, Preliminary (6202.0; \$10.70)
- 15** Housing Finance for Owner Occupation, Australia, September 1993 (5609.0; \$10.70)
- 16** Price Indexes of Articles Produced by Manufacturing Industry, Australia, September 1993 (6412.0; \$10.70)
- 18** Average Weekly Earnings, States and Australia, August 1993 (6302.0; \$12.70)
Export Price Index, Australia, September 1993 (6405.0; \$8.20)
- 19** Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, September 1993 (6407.0; \$10.70)
Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, September 1993 (6408.0; \$8.20)
- 23** Price Indexes of Materials Used in Manufacturing Industries, Australia, September 1993 (6411.0; \$10.70)
Import Price Index, Australia, September 1993 (6414.0; \$8.20)

Selected releases: 3 to 9 November

General

Publications Issued in October 1993 (1102.0; free)
Economic Indicators, Vic., October 1993 (1307.2; \$6.60)
South Australian Economic Indicators, November 1993 (1307.4; \$10.50)

National accounts, Finance and Foreign trade

Government Financial Estimates, Aust., 1993-94 (5501.0; \$21.40)
Government Financial Estimates, Aust., 1993-94 (Corrigendum) (5501.0; free)

Labour statistics and Prices

Price Indexes of Copper Materials, Aust., October 1993 (6410.0; \$4.60)
Price Indexes of Materials Used in Coal Mining, Aust., September 1993 (6415.0; \$10.70)
The Labour Force, Vic., August 1993 (6202.2; \$16.30)

Manufacturing, Mining, Energy, Service industries, Building and Construction

Manufacturing Production, Aust.: Household Appliances and Electrical Equipment, August-September 1993 (8357.0; \$9.00)
Manufacturing Production, Aust.: Plastics, Rubber, Paints, Detergents and Industrial Chemicals, July-August 1993 (8362.0; \$9.00)
Sales of Australian Wine and Brandy by Winemakers, September 1993 (8504.0; \$10.70)
Dwelling Unit Commencements Reported by Approving Authorities, SA, August 1993 (8741.4; \$10.70)
Building Approvals, NT, September 1993 (8731.7; \$7.10)

Transport

Motor Vehicle Registrations, WA, September 1993 (9303.5; \$7.60)

Key national indicators	Period	Units	Latest figure available		Percentage change (a) on	
			Original	Seasonally adjusted	Previous period	Corresponding period last year
National accounts						
Gross domestic product (GDP(A)) at 1989-90 prices	June qtr 93	\$m	n.a.	95 250	1.2	3.3
International accounts						
Balance on current account (b)	September 93	\$m	-1 629	-1 139	12	23
Balance on merchandise trade (b)	"	"	-208	110	—	-2
Balance on goods and services (b)	"	"	-546	-10	96	95
Merchandise exports	"	"	5 492	5 644	9	9
Merchandise imports	"	"	-5 700	-5 534	4	9
Net foreign debt	30 June 93	\$m	172 325	n.a.	7.5	12.9
Net foreign liabilities	"	"	222 984	n.a.	7.2	12.2
Consumption and Investment						
Retail turnover at current prices	September 93	\$m	8 099	8 224	0.8	3.2
New capital expenditure at 1989-90 prices	June qtr 93	no.	6 570	6 308	-3.0	6.0
New motor vehicle registrations	September 93	no.	42 543	39 636	-23.4	-10.0
Production						
Manufacturers' sales at 1989-90 prices	June qtr 93	\$m	34 296	34 540	0.9	1.2
Dwelling unit approvals	September 93	no.	15 738	14 889	2.3	11.4
Building approvals	"	\$m	2 478	2 388	6.2	29.1
Building work done at 1989-90 prices	June qtr 93	\$m	6 023	6 044	-3.1	2.2
Prices						
Consumer price index	September qtr 93	1989-90 = 100.0	109.8	n.a.	0.5	2.2
Articles produced by manufacturing industry	August 93	1988-89 = 100.0	115.4	n.a.	-0.1	1.6
Materials used in manufacturing industries	August 93	1984-85 = 100.0	127.1	n.a.	-0.1	0.0
Labour force and demography						
Employed persons (d)	September 93	'000	7 843.9	7 755.0	3.4	1.1
Participation rate † (d)	"	%	63.2	62.7	1.9	0.0
Unemployment rate † (d)	"	%	10.7	10.9	0.0	0.0
Job vacancies	August qtr 93	'000	39.0	37.3	18.0	38.9
Average weekly overtime per employee	"	hours	1.15	1.19	-0.5	8.3
Estimated resident population	December qtr 92	million	17.6	n.a.	0.2	1.1
Short-term overseas visitor arrivals	August 93	'000	240	257	5.5	20.8
Incomes						
Company profits before income tax	June qtr 93	\$m	3 978	4 435	-1.8	33.6
Av. weekly earnings, full-time adults; ordinary time	August qtr 93	\$	600.80	n.a.	0.5	2.6
Financial markets						
Interest rates (c) (monthly average)						
90-day bank bills †	September 93	% per annum	4.85	n.a.	2.1	-18.5
10-year Treasury bonds †	"	"	6.85	n.a.	3.0	-23.5
Exchange rate — \$US (c)	"	per \$A	0.6521	n.a.	-4	-10

(a) Based on seasonally adjusted figures where available. (b) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (c) Source: Reserve Bank of Australia. (d) Later figures expected to be released Thursday, 11 November 1993.
NOTES: † = change is shown in terms of percentage points. n.a. = not available.

Key State indicators

	Period	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
New capital expenditure*	March qtr 93	-0.1	4.7	-9.3	16.8	38.7	20.3	n.a.	n.a.	6.3
Retail turnover (trend estimate)	September 93	-1.2	5.3	3.0	5.0	11.1	1.2	n.a.	5.0	3.0
New motor vehicle registrations†	September 93	-9.6	-2.1	-23.1	-10.0	-8.8	-20.8	7.9	21.0	-10.0
Number of dwelling unit approvals*	September 93	0.2	14.5	30.0	-13.9	20.3	-4.4	173.6	-37.4	11.4
Value of total building work done	June qtr 93	-5.0	-6.1	18.6	13.0	31.3	-17.3	-6.7	-11.2	2.8
Employed persons*	September 93	0.1	0.8	1.6	0.4	4.8	0.4	0.1	3.4	1.1
Capital city consumer price index	June qtr 93	1.8	1.8	2.5	2.7	1.1	2.2	1.5	2.2	1.9
Av. weekly earnings (full-time adult ordinary time)	May qtr 93	0.1	2.2	5.0	1.7	-0.1	2.0	2.5	4.2	1.8
Population	Dec. qtr 92	0.9	0.5	2.5	0.5	1.2	0.5	1.0	1.5	1.1
Room nights in licensed hotels and motels, etc.	June qtr 93	4.6	3.6	12.2	-0.6	8.3	6.0	13.3	-7.1	6.4

* Seasonally adjusted except for NT and ACT. † Seasonally adjusted.

Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 7). Some of the figures shown are preliminary, some final, and some are revisions of previously published figures. Users should check the latest relevant publication or with the ABS Information Services if the status of the statistic is important. The ABS should be acknowledged as the source when reproducing or quoting any part of this publication.

